

## METHOD AND SYSTEM FOR COLLABORATING ADVISORS

### Abstract

The present invention provides a common collaboration tool to interact,  
5 communicate and serve a client in a coordinated manner in various areas of interest. The  
present invention enables a client to authorize selected advisors as well as other  
participants to view, discuss, modify and perform other operations in response to the  
client's request for services. A client may define the scope of authorization for advisors  
and/or other participants for security and confidentiality reasons. Advisors (and/or  
10 participants) may access information submitted (or authorized) by the client to collaborate  
as a cohesive team in sharing information, devising a plan, addressing client's concern,  
drafting (or modifying) a document and performing other services for the client. The  
present invention provides a mechanism to implement planning in an organized and  
efficient manner, by promoting consistent and accurate collaboration of resources and  
15 efforts.